

# NIH Business and Research Support System

## Project Update and Demonstration

# Presentation Objectives

- Provide an overview of the NBS project
- Promote awareness of Change Management initiatives
- Introduce the community to general NBS features and functionality
- Demonstrate the integration among NBS applications
- Provide an understanding of NBS workflow

# Project Objectives

## ***NBRSS***

To improve NIH's total administrative and scientific support capability, not just its accounting function, by:

- Linking the accounting systems and all administrative and scientific support functions
- Incorporating “best practice” administrative processes
- Balancing the standardization of practices with IC and scientist flexibility

## ***NBS***

- Replace ADB and CAS with Oracle and Bolt-Ons

## ***EHRP***

- Prepare NIH for HHS' Replacement of IMPACT with PeopleSoft
- Ensure Uninterrupted Operations of Other NIH HR Systems
- Provide HR Data for NBS

# Scope of the NBS

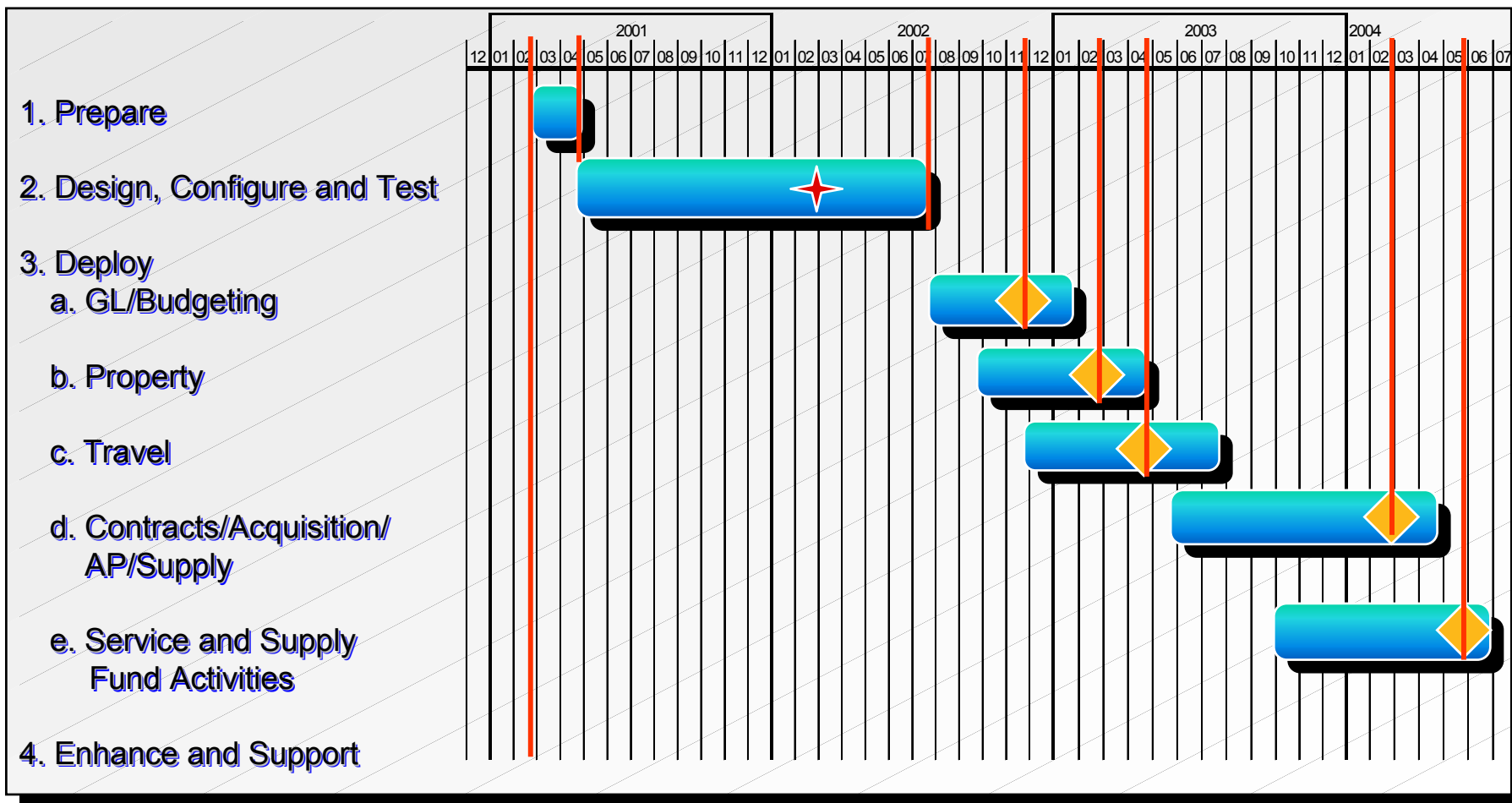
- The ERP – composed of an Oracle Financials package and several bolt-on, integrated software packages – encompasses the following six functional areas:
  - Financial Management
  - Travel
  - Property
  - Research and Development (R&D) Contracting
  - Supply/Acquisition
  - Service and Supply Funds

# One DHHS – NIH Strategy

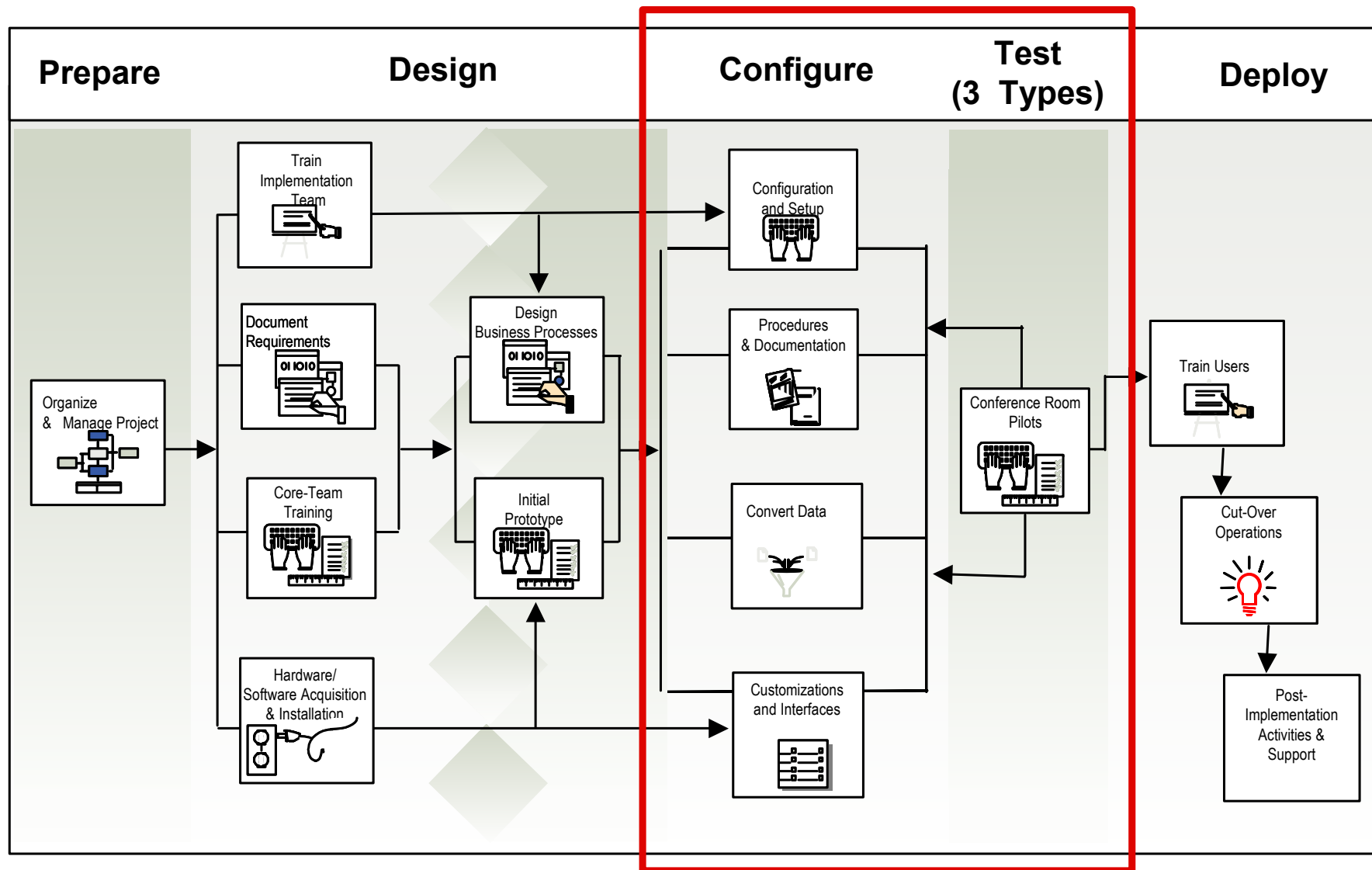
## Proposal – NBS Deployment as a “Proof of Concept”

- The Unified Financial Management System is a restructuring initiative to move to two DHHS accounting systems.
  - One system for CMS; one for all other Agencies (corporate system)
  - Is first step in a 5-year Plan to integrate and consolidate administrative systems.
- Strategy is to utilize the work being done by NIH as a “proof of concept” for the corporate system.
  - DHHS develops an accounting structure by March 2002; NIH incorporates it into the NBS and provides a copy of the NBS software to DHHS by July 2002; NIH begins deployment in August 2002.
  - DHHS Agencies assess how well the NIH-configured software satisfies their requirements and modify the software as necessary.
  - NIH modifies its software as required to be consistent with DHHS.

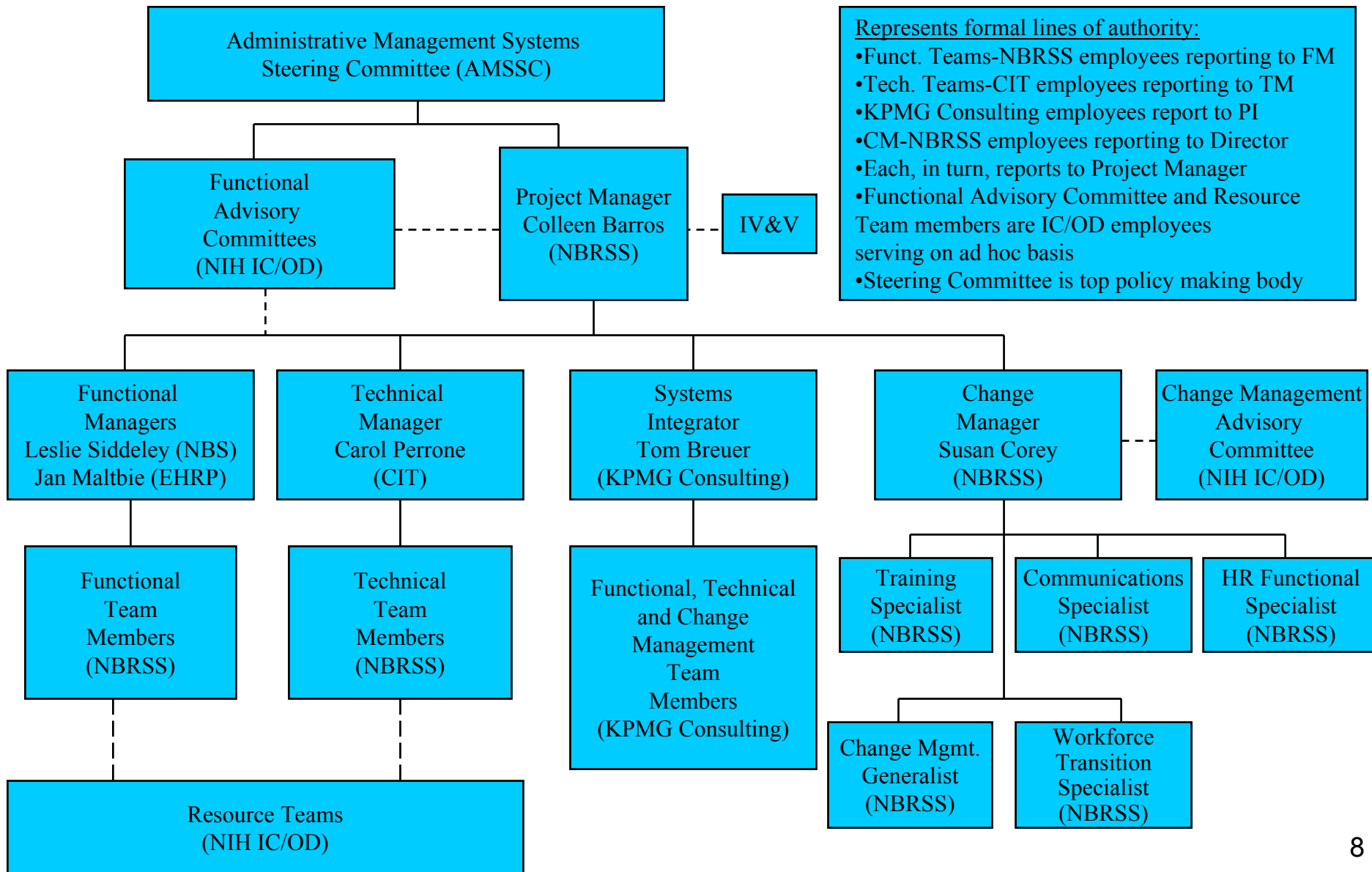
# NBS Deployment Schedule



# NBS Project Status



# Organization and Staffing – Formal Structure





# AMSSC Members

- Mr. Charles Leasure, *DDM, NIH (Co-chair)*
- Dr. Lawrence Tabak, *Director, NIDCR (Co-chair)*
- Mr. Al Graeff, *CIO, NIH & Director, CIT*
- Ms. Colleen Barros, *Assoc Director for Mgt, NIA (Project Manager)*
- Mr. Fred Walker, *Acting Director for HR Mgt, NIH*
- Mr. Don Christoferson, *Assoc Director for Admin Mgt, NHLBI*
- Ms. Judy Duff, *EO, NEI*
- Mr. Steve Ficca, *Assoc Director for Research Services, NIH*
- Dr. Ron Geller, *Director, Office of Extramural Programs, NIH*
- Mr. John Gimperling, *Ch, Program Planning & Eval, OEO, NIH*
- Ms. Lynn Hellinger, *Assoc Director for Mgt & Ops, NIAID*
- Ms. Marilyn Kunzweiler, *Ch, Extramural Admin Mgt Branch, NIAID*

# AMSSC Members

- Dr. Leamon Lee, *Assoc Director for Admin, NIH*
- Ms. Janis Mullaney, *Assoc Dep. Director for Admin Ops, NCI*
- Ms. Lee Pushkin, *Asst. Director for Budget, NIH*
- Mr. Ken Stith, *Deputy CFO & Director, OFM, NIH*
- Dr. Richard Wyatt, *Exec. Director, OIR, NIH*
- TBD, *Scientific Director for Intramural Research, NEI*

## ***Non-Voting Members***

- Dr. John J. McGowan, *Project Manager, electronic Research Administration (eRA)*
- Mr. Tony Itteilag, *Senior Advisor to the Director, NIH*
- Ms. Margie Yanchuk, *DHHS Representative*

Functional Advisory Committees (FACs)							
	Acquisition/ Supply	Financial Management	Property	R&D Contracts	Service & Supply Fund	Travel	TOTAL
CC	1	1	1	0	1	1	5
CIT	0	0	0	0	1	0	1
NCI	2	2	1	1	1	1	8
NCRR	0	1	0	0	0	0	1
NEI	0	0	1	0	0	1	2
NHLBI	1	2	0	1	1	1	6
NIA	0	1	0	0	0	0	1
NIAID	2	0	1	1	0	1	5
NICHD	0	0	1	0	0	0	1
NIDA	1	0	0	0	0	0	1
NIDCD	1	0	1	0	0	1	3
NIDDK	1	1	0	1	1	0	4
NIGMS	0	0	0	0	0	1	1
NIMH	1	0	0	0	0	0	1
NINDS	1	1	1	0	1	1	5
NINR	1	1	0	0	0	0	2
NLM	0	1	0	0	0	1	2
OD	5	4	3	4	2	2	20
<b>Grand Total</b>							<b>69</b>

# Employees Involved in NBS RTs

Resource Teams (RTs)							
	Acquisition/ Supply	Financial Management	Property	R&D Contracts	Service & Supply Fund	Travel	TOTAL
CC	3	2	1	0	1	1	8
CIT	0	2	1	0	2	0	5
CSR	1	0	0	0	0	0	1
FIC	0	1	0	0	0	0	1
NCI	2	8	1	2	1	3	17
NCRR	0	0	0	0	1	0	1
NEI	1	0	0	0	0	1	2
NHGRI	0	0	1	0	0	1	2
NHLBI	2	3	2	1	2	2	12
NIA	1	1	1	0	0	0	3
NIAAA	1	0	0	0	1	0	2
NIAID	2	1	1	2	0	1	7
NICHHD	2	1	0	2	0	2	7
NIDA	0	0	0	0	0	0	0
NIDCD	0	0	1	0	0	1	2
NIDDK	2	0	1	0	0	0	3
NIGMS	1	1	0	1	0	4	7
NIMH	0	0	1	0	0	0	1
NINDS	2	1	2	0	1	0	6
NINR	1	0	0	0	0	1	2
NLM	1	0	1	0	0	0	2
OD	13	13	10	5	11	2	54
<b>Grand Total</b>							<b>145</b>

# Importance of Change Management

- An integrated communications, training, workforce transition, and evaluation approach to assisting managers, supervisors and employees to transition effectively into a new way of accomplishing work
- When ERP implementations are delayed, it is most often due to change management issues, not to technical issues.
- Therefore, significant attention was focused on change management prior to implementation.

# Current Status of NBS Communication

- NBS system demos delivered to FAC Co-Chairs, FACs and RTs – ~150 NIH business community representatives reached to date.
- NBS system demos being planned for both functional and administrative users.
- Change Management Advisory Committee formed as sounding board on communication activities.
- Project Overview Briefings delivered to:
  - NIH IC Directors
  - NIH Executive Officers
  - Extramural AOs
  - Budget Officers
  - ITMC
  - OEO/EEO Community
  - Intramural AOs
  - EPMC
  - MAWG
  - Scientific Directors
- A document listing “Frequently Asked Questions” (and answers) about the NBS was e-mailed to NIH community in February.
- Article on NBRSS project appeared in February *NIH Record*.

# NBS Training Strategy

- Developing skills, knowledge and abilities for project participants and end-users, and facilitating NIH sponsored training for employees whose duties are impacted by NBRSS business process changes
- Addresses needs of Power Users and Casual Users
  - Power Users use the NBS system to initiate actions and enter data
  - Casual Users use the NBS system to approve or oversee actions initiated by others, or to view information contained in the system.
- Depending on the user type, training will involve instructor-led classroom instruction, static and interactive self-paced learning tools, user guides, OJT and web-based support.

# Estimated Number of Trainees

<b><u>NBS</u></b>	<b>Power Users</b>	<b>Casual Users</b>
• General Ledger	154	
• Accts Payable	40	200
• Accts Receivable	20	200
• Property	606	
• Acquisitions/Supply	850	2,300
• Inventory	40	
• R&D Contracts	350	
• SSF Projects	220	400
• Travel	<u>2,195</u>	<u>750</u>
<b>TOTAL NBS</b>	<b>4,475</b>	<b>3,850</b>



# NBS Workforce Transition

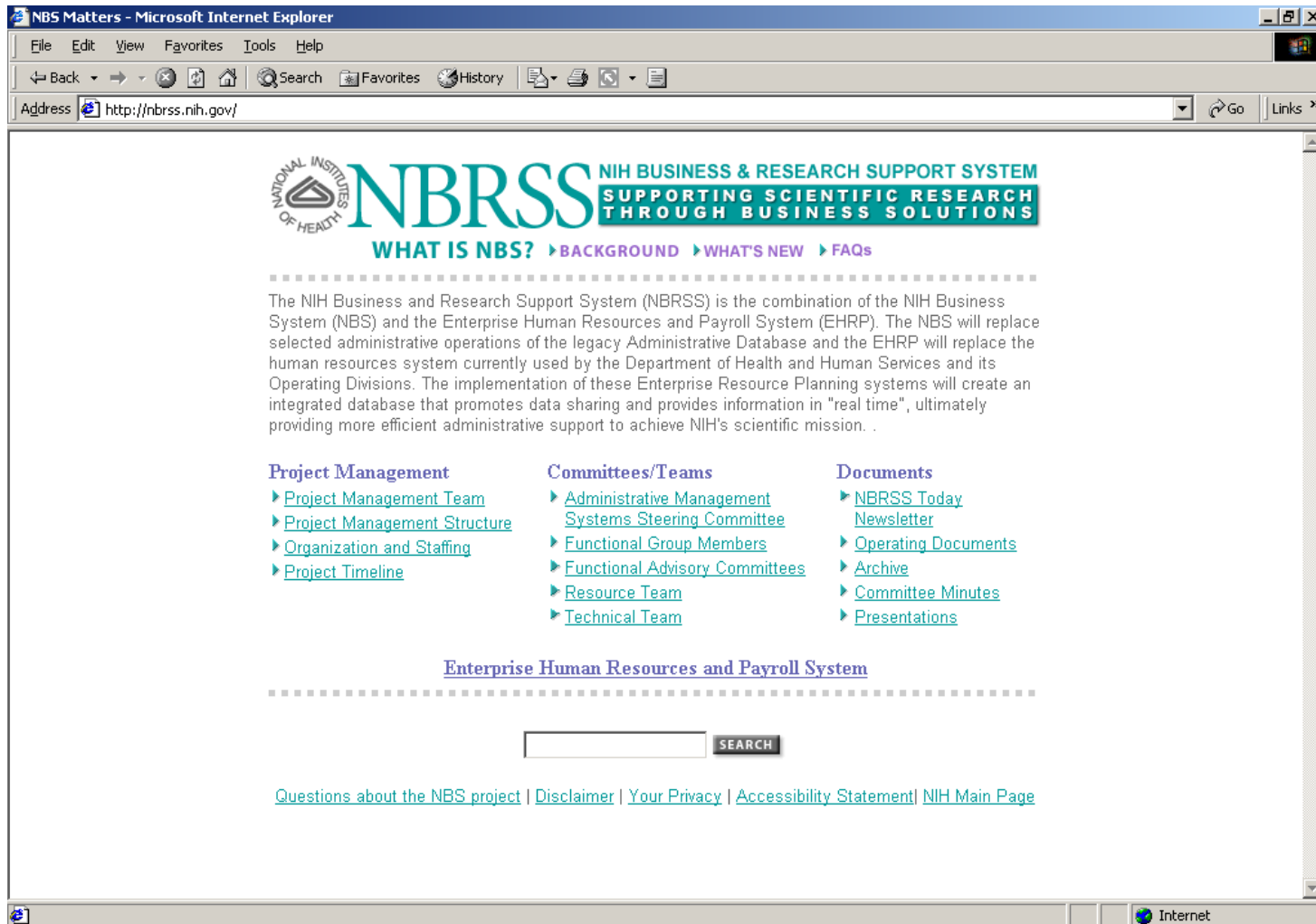
- Impact of business/system changes on workload and workforce will be analyzed – changes may affect the number of positions and type of skills required.
- Currently coordinating with program office, OHRM, OEO, and IC and OD representatives to address any workforce changes and develop a workforce transition strategy that will ensure consistent and equitable workforce transition policies.
- Consider integration of NBRSS workforce transition issues with other NIH workforce transition issues

# Evaluation

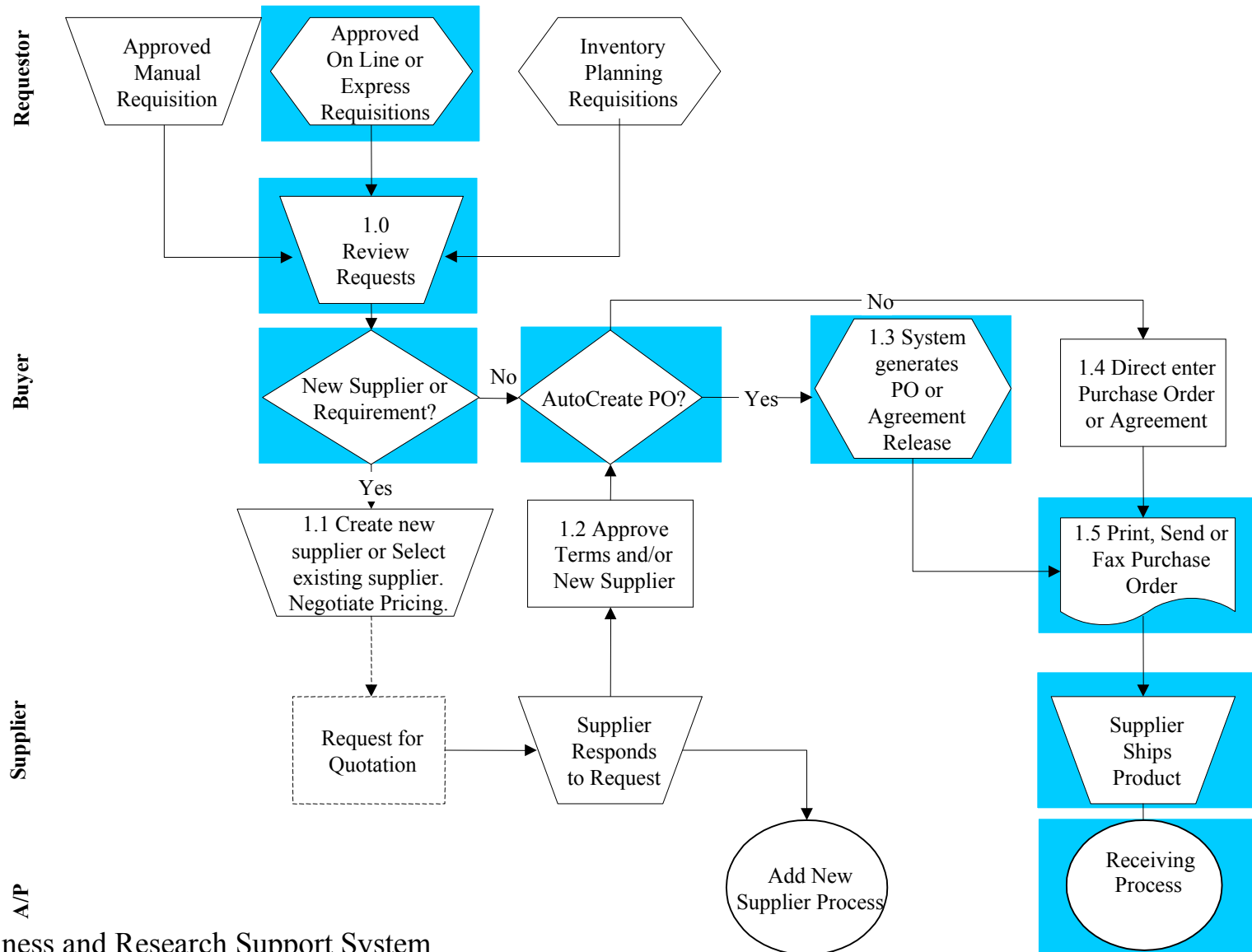
- On a continuing basis, the NBRSS change management efforts will be evaluated based on critical success factors
- Factors may include:
  - The degree to which the workforce feels informed about changes affecting them
  - Workforce acceptance of best practices stemming from the implementation
  - Use of the new system
- Using surveys, questionnaires and interviews

# Where can I find out more about the NBRSS project?

<http://nbrss.nih.gov>



# Online Demo – Sample Discussion



# View Available Funds and Actuals

Oracle Federal Administrator:

- Displays available fund balances
- Real time updates of accruals, obligations and expenditures

Oracle Applications - a155crp1 (PYRITE)

File Edit View Folder Tools Window Help

Funds Available Inquiry

**Selection Criteria**

Budget **FUNDING BUDGET** Period Type **Year To Date**  
 Period Name **APR\_02\_FY02**

**Rollup Criteria**

Rollup Type **Treasury Symbol** Treasury Symbol **75-X-4554** Low High

**Funds Available (USD)**

Budget Authority **1,784,250.00**

**Actuals**

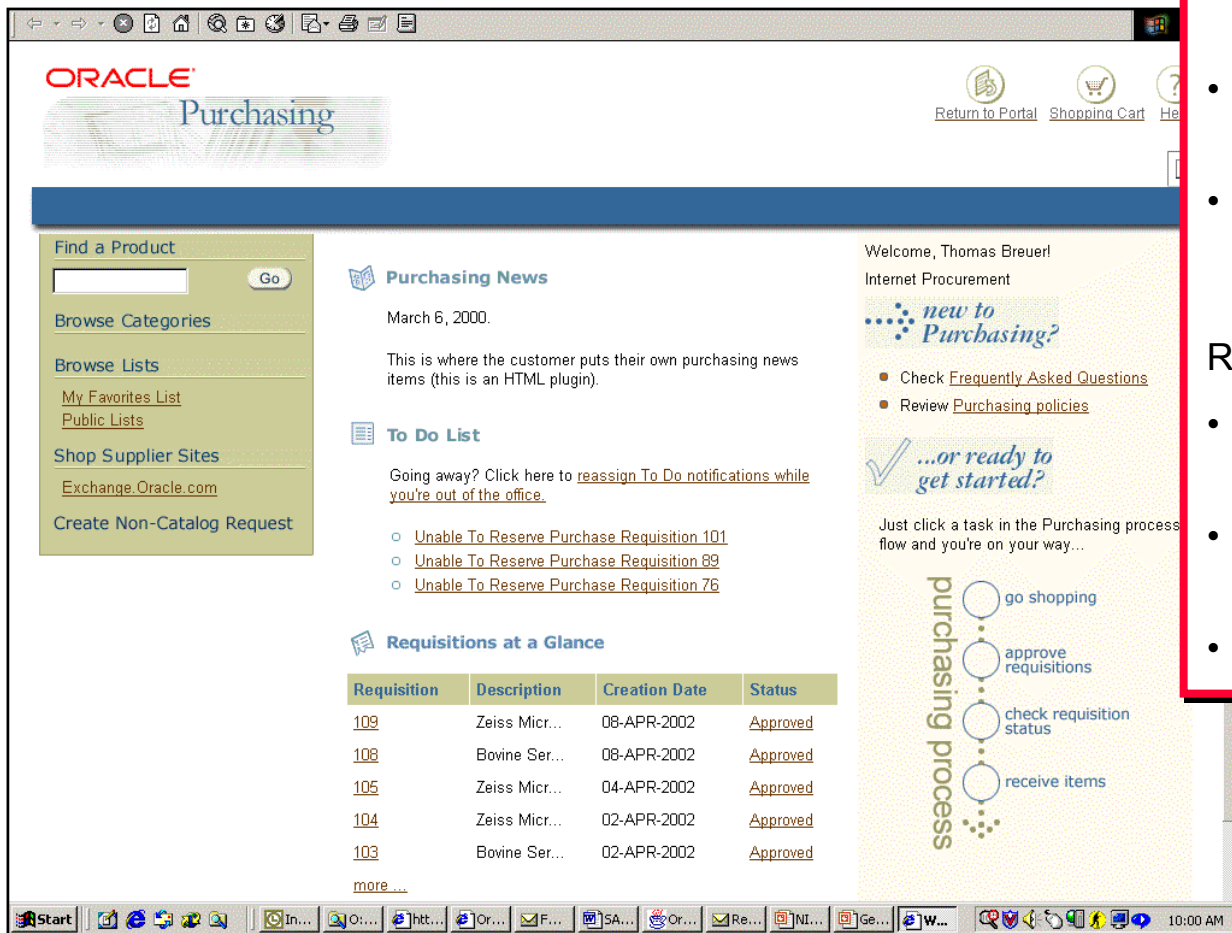
Total Actuals	Commitments	Obligations	Expenditures
<b>77,888.28</b>	<b>16,780.75</b>	<b>5,400.00</b>	<b>55,707.53</b>

Funds Available **1,706,361.72**

Record: 1/1 ... List of Valu... <OSC>

Start | Calendar... | Generic... | NCRR-4... | Welcome... | http://py... | Oracle A... | Oracle A... | 8:42 AM

# Find a Product/Service



**ORACLE Purchasing**

Return to Portal Shopping Cart Help

**Find a Product**

**Browse Categories**

**Browse Lists**

[My Favorites List](#)

[Public Lists](#)

**Shop Supplier Sites**

[Exchange Oracle.com](#)

[Create Non-Catalog Request](#)

**Purchasing News**

March 6, 2000.

This is where the customer puts their own purchasing news items (this is an HTML plugin).

**To Do List**

Going away? Click here to [reassign To Do notifications while you're out of the office.](#)

- [Unable To Reserve Purchase Requisition 101](#)
- [Unable To Reserve Purchase Requisition 89](#)
- [Unable To Reserve Purchase Requisition 76](#)

**Requisitions at a Glance**

Requisition	Description	Creation Date	Status
<a href="#">109</a>	Zeiss Micr...	08-APR-2002	<a href="#">Approved</a>
<a href="#">108</a>	Bovine Ser...	08-APR-2002	<a href="#">Approved</a>
<a href="#">105</a>	Zeiss Micr...	04-APR-2002	<a href="#">Approved</a>
<a href="#">104</a>	Zeiss Micr...	02-APR-2002	<a href="#">Approved</a>
<a href="#">103</a>	Bovine Ser...	02-APR-2002	<a href="#">Approved</a>

[more ...](#)

Welcome, Thomas Breuer!  
Internet Procurement

**new to Purchasing?**

- Check [Frequently Asked Questions](#)
- Review [Purchasing policies](#)

**...or ready to get started?**

Just click a task in the Purchasing process flow and you're on your way...

**purchasing process**

- go shopping
- approve requisitions
- check requisition status
- receive items

## Oracle Purchasing:

- Self Service Requisitioning Capability for end-users
- Intuitive, web-based user interface
- Pre-integrated with Accounting, Inventory and other functions

## Results:

- Automates procurement process
- Simplifies access to information
- Reduces training needs

# Add Product Service to Cart

Self Service Requisitioning leverages well accepted model for web-shopping like Amazon.com and e-Bay:

Easy search to find goods . . .

Oracle iProcurement : My Favorites List - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Print

Address http://pyrite.cit.nih.gov:11010/oa\_servlets/oracle.apps.icx.por.apps.AppsManager

ORACLE Purchasing

Return to Portal Shopping

Catalogs Shopping Lists Non-Catalog Request

View My Favorites List Go

Items in My Favorites List

Select item(s) and... Add to Cart Delete

Sort by Supplier Ascending Descending Go

Select All Clear All Previous 1 - 4 Shown of 4 Next

Select	Item Description	Item	Unit	Price (USD)	Supplier
<input type="checkbox"/>	Agar		each	14.98	
<input type="checkbox"/>	Bovine Serum Albumin (BSA)		each	125.00	
<input type="checkbox"/>	Thiopental Sodium		each	48.65	3-DIMENSIONAL PHARMACEUTICALS INC
<input checked="" type="checkbox"/>	Zeiss Microscope		each	5,400.00	

Start In... O:... htt... Or... F... SA... Or... Re... NI... Ge... Or... 10:01 AM



# Continue Shopping or Proceed to Checkout

Oracle iProcurement : Shopping Cart - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Print


Address http://pyrite.cit.nih.gov:11010/oa\_servlets/oracle.apps.icx.por.apps.AppsManager

**ORACLE**  
Purchasing


Return to Port

**Shopping Cart**

Shopping Cart Delivery Billing Notes Approvers Review & Submit

 **Shopping Cart Contents**

► [Open Saved Cart](#)

Line	Item Description	Special Info	Unit	Quantity	Price	Total (USD)	Delete
1	Zeiss Microscope		each	<input type="text" value="1"/>	5400.00	5,400.00	
						<a href="#">update</a> Total (USD)	5,400.00

To view new totals after updating quantities, click the [update](#) link.

[Return to Shopping](#)

☐ I urgently need a purchase order number and want one assigned during checkout

[Save Cart](#) [Express Checkout](#) [Proceed to Checkout](#)

Save the items in your cart and complete the checkout process at a later time.  
[Learn more](#)

One-step checkout for return shoppers. Delivery and billing instructions default from My Profile

Easy step-by-step checkout lets you enter detailed delivery and billing instructions

Done Start In... Or... htt... Or... F... SA... Or... Re... NI... Ge... Or... Internet 10:02 AM

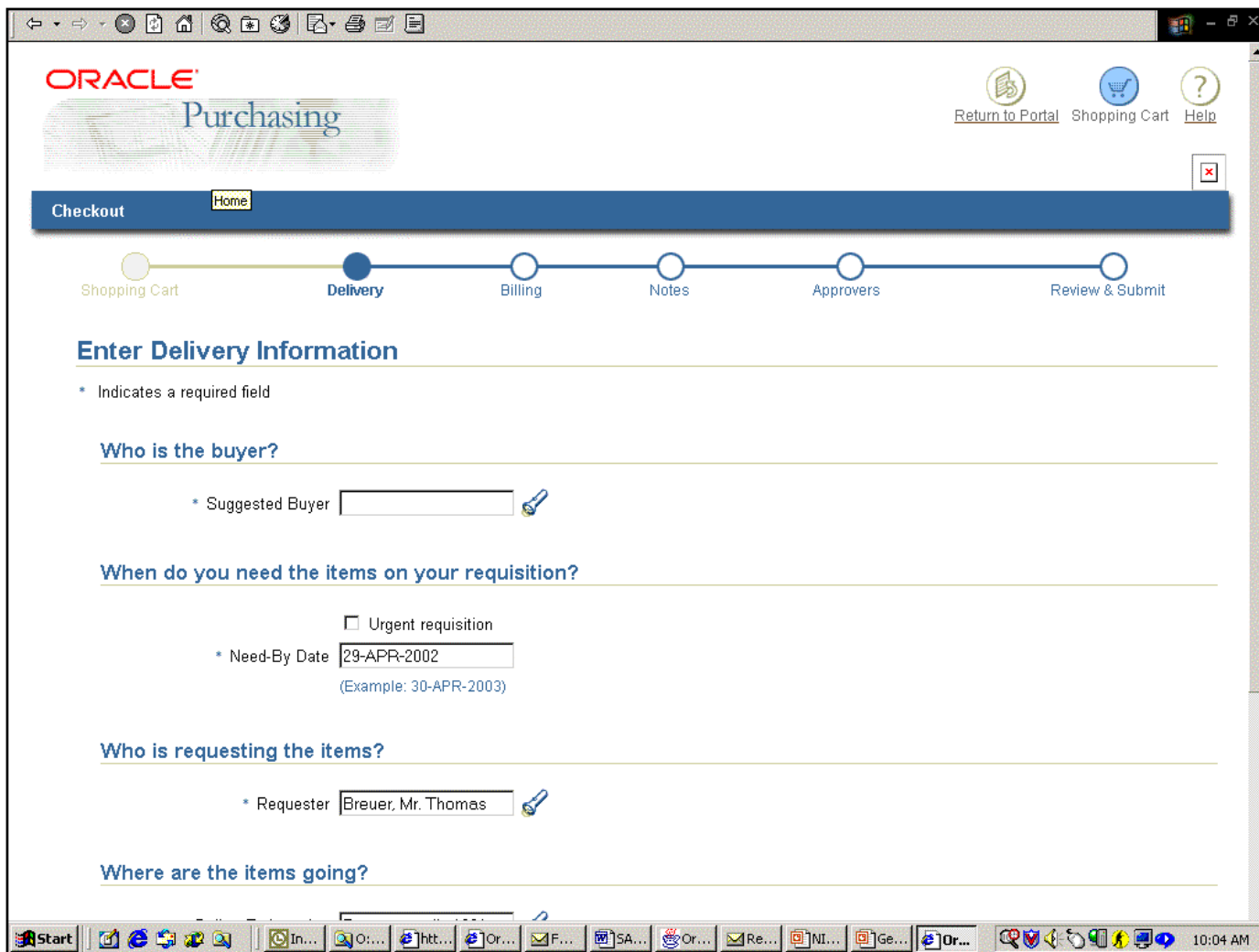
... shopping cart and check-out.

Which Results in:

- Increased service levels and customer satisfaction
- Better and more timely information



# Enter Delivery Information



ORACLE  
Purchasing

Return to Portal Shopping Cart Help

Checkout Home

Shopping Cart Delivery Billing Notes Approvers Review & Submit

## Enter Delivery Information

- \* Indicates a required field

**Who is the buyer?**

- \* Suggested Buyer

**When do you need the items on your requisition?**

☐ Urgent requisition

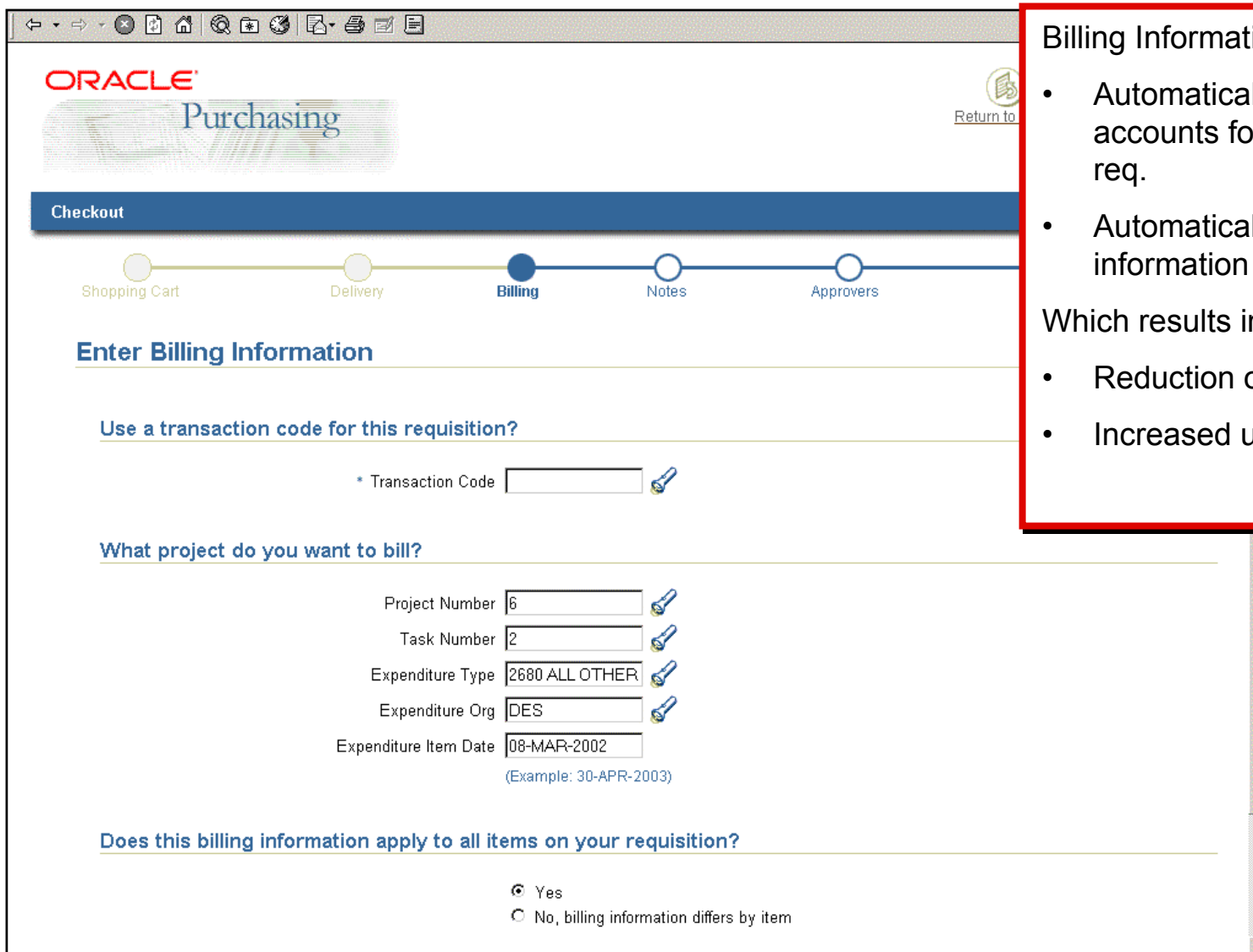
- \* Need-By Date   
(Example: 30-APR-2003)

**Who is requesting the items?**

- \* Requester

**Where are the items going?**

# Enter Billing Information



ORACLE®  
Purchasing

Return to

Checkout

Shopping Cart Delivery **Billing** Notes Approvers

**Enter Billing Information**

Use a transaction code for this requisition?

\* Transaction Code

What project do you want to bill?

Project Number

Task Number

Expenditure Type

Expenditure Org

Expenditure Item Date   
(Example: 30-APR-2003)

Does this billing information apply to all items on your requisition?

☒ Yes  
☐ No, billing information differs by item

Billing Information will:

- Automatically generate accounts for each line on the req.
- Automatically default projects information

Which results in:

- Reduction of errors
- Increased user friendliness

# Review and Edit Charge Accounts

Oracle iProcurement : Charge Accounts - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Print

Address http://pyrite.cit.nih.gov:11010/oa\_servlets/oracle.apps.icx.por.apps.AppsManager

**ORACLE**  
Purchasing

Return

**Checkout**

Shopping Cart Delivery **Billing** Notes Approvers

**Review Charge Accounts**

Click on a Charge Account link to edit or allocate the item cost to multiple accounts.

Line	Item Description	Unit	Quantity	Price	Total (USD)	Charge Account
1	Zeiss Microscope	each	1	5400.00	5,400.00	<u>084554XXXXORA0.2002.06.00000037.1.036.992.B23.268205.610001000.2002.999.9999.9999</u>
<b>Total (USD)</b>					<b>5,400.00</b>	

[Clear Checkout Changes and Return to Shopping Cart](#)

[Continue](#)

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

Start In... O:... htt... Or... F... SA... Or... Re... NI... Ge... Or... Internet 10:09 AM

Billing Information will:

- Automatically generate accounts for each line on the req.

Which results in:

- Reduction of errors
- Increased user friendliness

# Enter Notes and Attachments

Oracle iProcurement : Notes & Attachments - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Print

Address http://pyrite.cit.nih.gov:11010/oa\_servlets/oracle.apps.icx.por.apps.AppsManager

ORACLE  
Purchasing

Return to Portal

Checkout

Shopping Cart Delivery Billing **Notes** Approvers Review

## Enter Notes & Attachments

\* Indicates a required field

### Describe your requisition

\* Requisition Description

Click here to [automatically default the requisition description](#) based on the first line item's description. You can always edit this default.

### Add notes and attachments

Note to Buyer

Done Internet

Start In... O:... htt... Or... F... SA... Or... Re... NI... Ge... Or...

10:09 AM

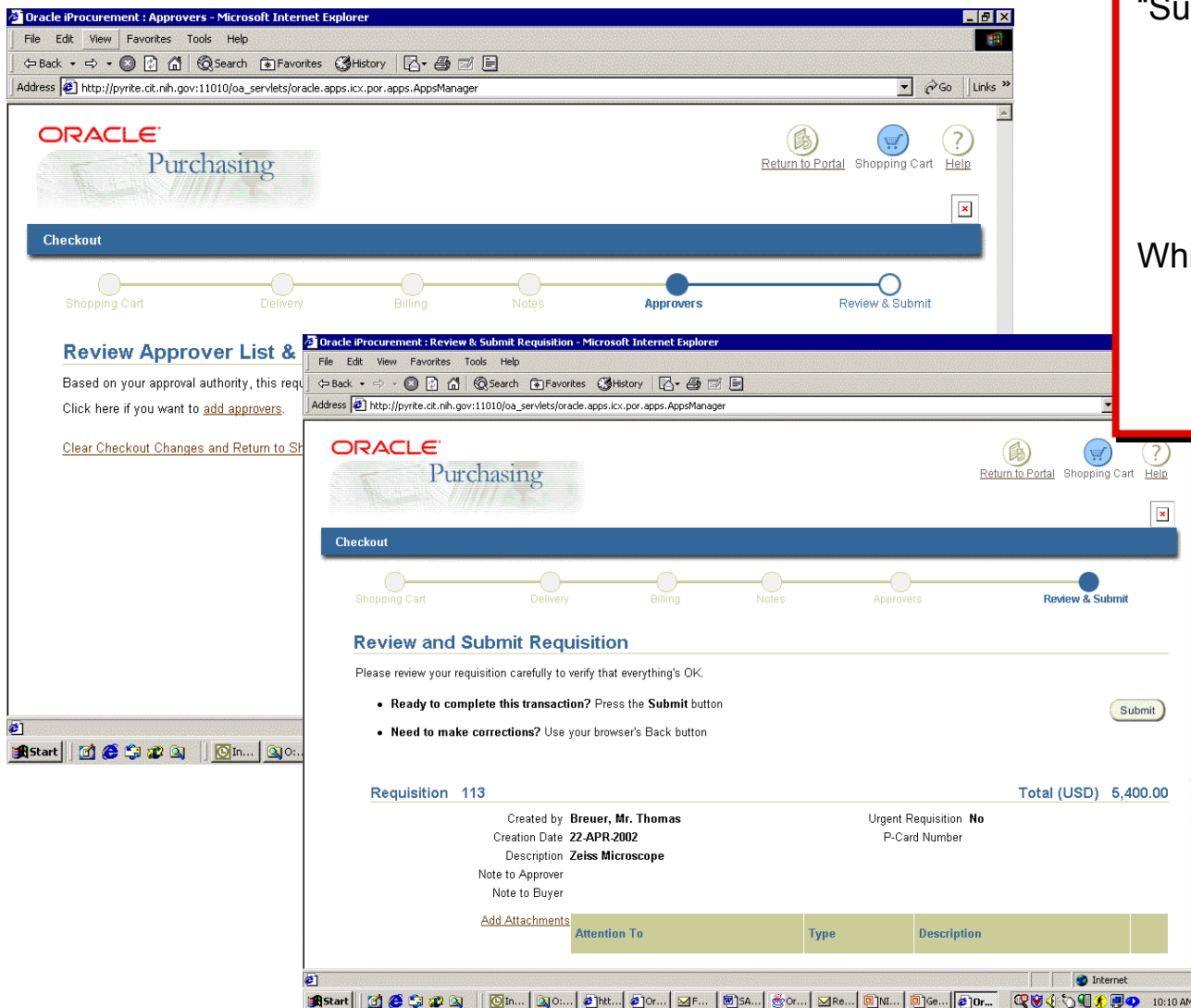
Notes and Attachments will:

- Allow requisitioners to suggest different suppliers for different line items
- Allow requisitioners to add attachments

Which results in:

- Multiple suppliers per requisition

# Review and Approve Online Requisition



The screenshot displays two overlapping browser windows from the Oracle iProcurement system. The top window, titled 'Oracle iProcurement : Approvers', shows a 'Checkout' process with steps: Shopping Cart, Delivery, Billing, Notes, **Approvers** (current step), and Review & Submit. Below the steps is a 'Review Approver List &' section. The bottom window, titled 'Oracle iProcurement : Review & Submit Requisition', shows the 'Review and Submit Requisition' page. It includes a 'Submit' button and a list of requisition details for Requisition 113.

**Requisition 113 Details:**

Attention To	Type	Description
Created by Breuer, Mr. Thomas	Urgent Requisition	No
Creation Date 22-APR-2002	P-Card Number	
Description Zeiss Microscope		
Note to Approver		
Note to Buyer		

Total (USD) 5,400.00

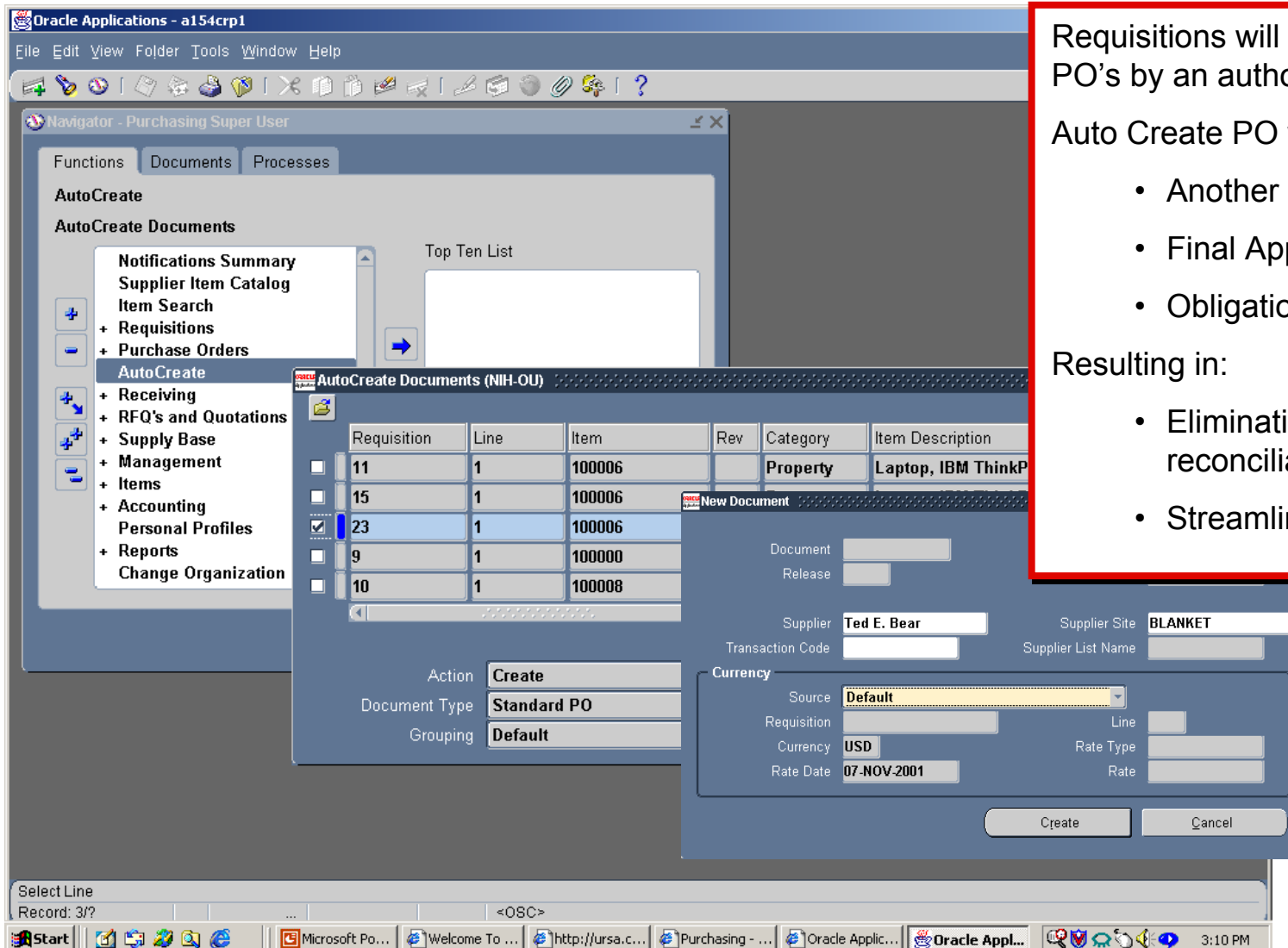
“Submit Requisition” causes:

- Funds Checking
- Approval Routing
- Commitment Entries

Which produce:

- Better accounting detail
- Commitment accounting

# Review Request and Autocreate PO



Oracle Applications - a154crp1

File Edit View Folder Tools Window Help

Navigator - Purchasing Super User

Functions Documents Processes

AutoCreate

AutoCreate Documents

Notifications Summary  
Supplier Item Catalog  
Item Search  
+ Requisitions  
+ Purchase Orders  
AutoCreate  
+ Receiving  
+ RFQ's and Quotations  
+ Supply Base  
+ Management  
+ Items  
+ Accounting  
Personal Profiles  
+ Reports  
Change Organization

Top Ten List

Requisition	Line	Item	Rev	Category	Item Description
11	1	100006		Property	Laptop, IBM ThinkP
15	1	100006			
23	1	100006			
9	1	100000			
10	1	100008			

Action **Create**

Document Type **Standard PO**

Grouping **Default**

**New Document**

Document

Release

Supplier **Ted E. Bear** Supplier Site **BLANKET**

Transaction Code  Supplier List Name

Currency

Source **Default**

Requisition  Line

Currency **USD** Rate Type

Rate Date **07-NOV-2001** Rate

Create Cancel

Select Line

Record: 3/?

Start Microsoft Po... Welcome To ... http://ursa.c... Purchasing - ... Oracle Applic... Oracle Appl... 3:10 PM

Requisitions will be converted to PO's by an authorized buyer.

Auto Create PO will cause:

- Another Funds Check
- Final Approvals
- Obligation Entries

Resulting in:

- Elimination of reconciliation efforts
- Streamlined cycle times

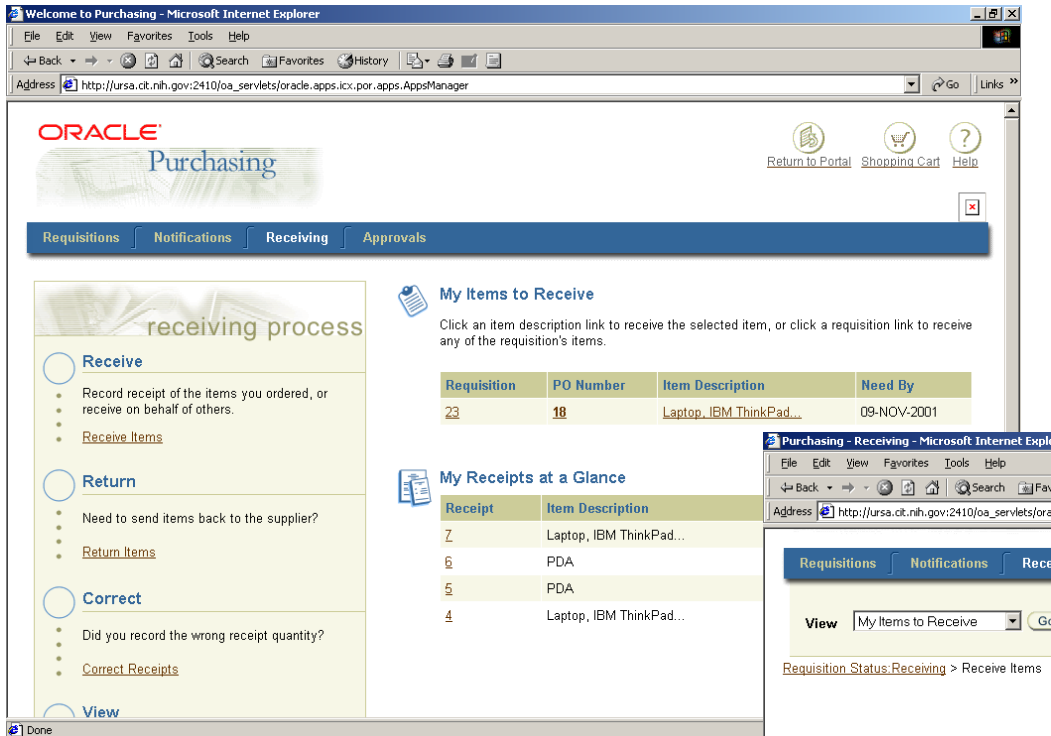
# Receive Product

“Receive Items” causes:

- Property and inventory transactions updates
- Accounting updates

Which produces:

- More accurate and timely information, in this case for property, accounting and purchasing
- Improved vendor payments



**receiving process**

- Receive**
  - Record receipt of the items you ordered, or receive on behalf of others.
  - [Receive Items](#)
- Return**
  - Need to send items back to the supplier?
  - [Return Items](#)
- Correct**
  - Did you record the wrong receipt quantity?
  - [Correct Receipts](#)
- View**

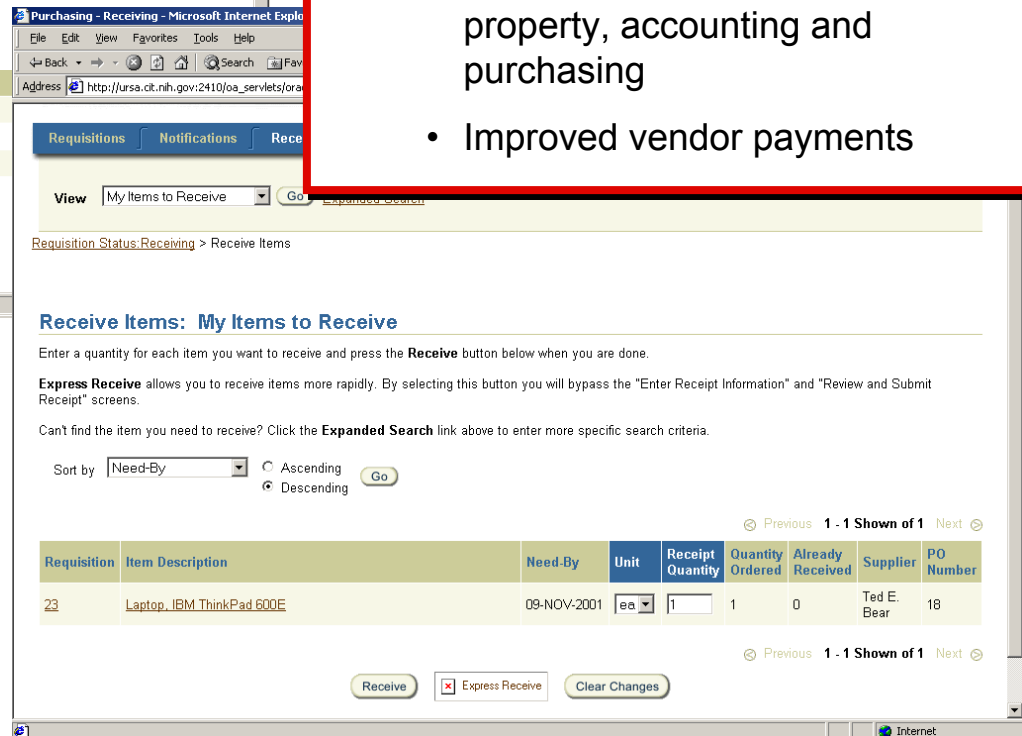
**My Items to Receive**

Click an item description link to receive the selected item, or click a requisition link to receive any of the requisition's items.

Requisition	PO Number	Item Description	Need By
23	18	Laptop, IBM ThinkPad...	09-NOV-2001

**My Receipts at a Glance**

Receipt	Item Description
7	Laptop, IBM ThinkPad...
6	PDA
5	PDA
4	Laptop, IBM ThinkPad...



**Receive Items: My Items to Receive**

Enter a quantity for each item you want to receive and press the **Receive** button below when you are done.

**Express Receive** allows you to receive items more rapidly. By selecting this button you will bypass the "Enter Receipt Information" and "Review and Submit Receipt" screens.

Can't find the item you need to receive? Click the **Expanded Search** link above to enter more specific search criteria.

Sort by:  ☐ Ascending ☒ Descending

Requisition	Item Description	Need-By	Unit	Receipt Quantity	Quantity Ordered	Already Received	Supplier	PO Number
23	Laptop, IBM ThinkPad 600E	09-NOV-2001	ea	1	1	0	Ted E Bear	18